

Process Orchestration – State of the Market Report 2022

October 2021: Complimentary Abstract / Table of Contents



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Background of the research

Enterprises' adoption of Intelligent Automation (IA) technologies has been increasing steadily over the past few years. As enterprises scale up their digital transformation initiatives, a vast majority of them face numerous challenges to manage the digital workers in addition to various software applications. Enterprise process orchestration solutions help in addressing these challenges by connecting multiple disparate systems and applications across one platform while orchestrating tasks between the robotic and human workforce. These solutions help better manage human+machine dynamics and orchestrate the flow of work across the hybrid workforce to realize greater business value from investments in digital technologies. Thus, process orchestration solutions find a wide variety of use cases from different business functions and verticals.

In this report, we assess the state of the process orchestration software vendor market and focus on:

- Process orchestration market overview
- Process orchestration adoption by enterprises
- Product capabilities and solution characteristics
- Process orchestration technology provider landscape
- Outlook for 2021-22

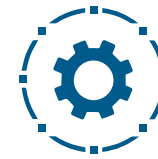
Scope of this report:



Geography
Global



Products
Process orchestration



Technology providers
14 leading process orchestration
technology providers



Case studies
Five enterprise case studies

Overview and abbreviated summary of key messages (page 1 of 2)

This research provides process orchestration buyers, software providers, and third-party enablers (service providers and system integrators) a detailed view of the process orchestration market and analyzes it across dimensions, including market size and adoption trends, solution characteristics, product capabilities, enterprise case studies, technology provider landscape, and outlook for 2021-22.

Some of the findings in this report, among others, are:

Introduction to process orchestration

- Process orchestration software provides capabilities for design and management of end-to-end processes along with process and workforce insights
- Process orchestration solutions offer myriad benefits including cost and operational efficiencies, leading to greater demand among enterprises
- Key applications driving the adoption of process orchestration solutions range from process standardization and workflow automation to hybrid workforce management

Process orchestration market size and adoption trends

- Process orchestration market size was estimated to be US\$1,800-1,830 million in 2020 and is expected to grow at a rate of 25-30% over the next two years, with the market showing strong recovery after the impact of COVID-19
- Banking & capital markets and insurance sectors are the largest adopters of process orchestration solutions and account for 22% and 12% of the process orchestration market, respectively
- North America is the largest market for process orchestration solutions with over 50% market share, while LATAM and the UK markets are growing rapidly

Process orchestration adoption by enterprises

- Internal resistance, lack of stakeholder alignment, measuring RoI, lack of overall process visibility, and inadequate technology awareness are the main barriers to process orchestration adoption

Overview and abbreviated summary of key messages (page 2 of 2)

Product capabilities and solution characteristics

- Process orchestration software includes different capabilities such as process design and execution, business rules and decision management, low-code/no-code user interface development, hybrid workforce management, monitoring and analytics, and other ancillary capabilities
- Process orchestration providers leverage technology partners and services partners primarily for complementary capabilities, reselling, and product implementation
- User-based pricing is the most prevalent model in the market and fixed-fee pricing is the most adopted model by enterprises

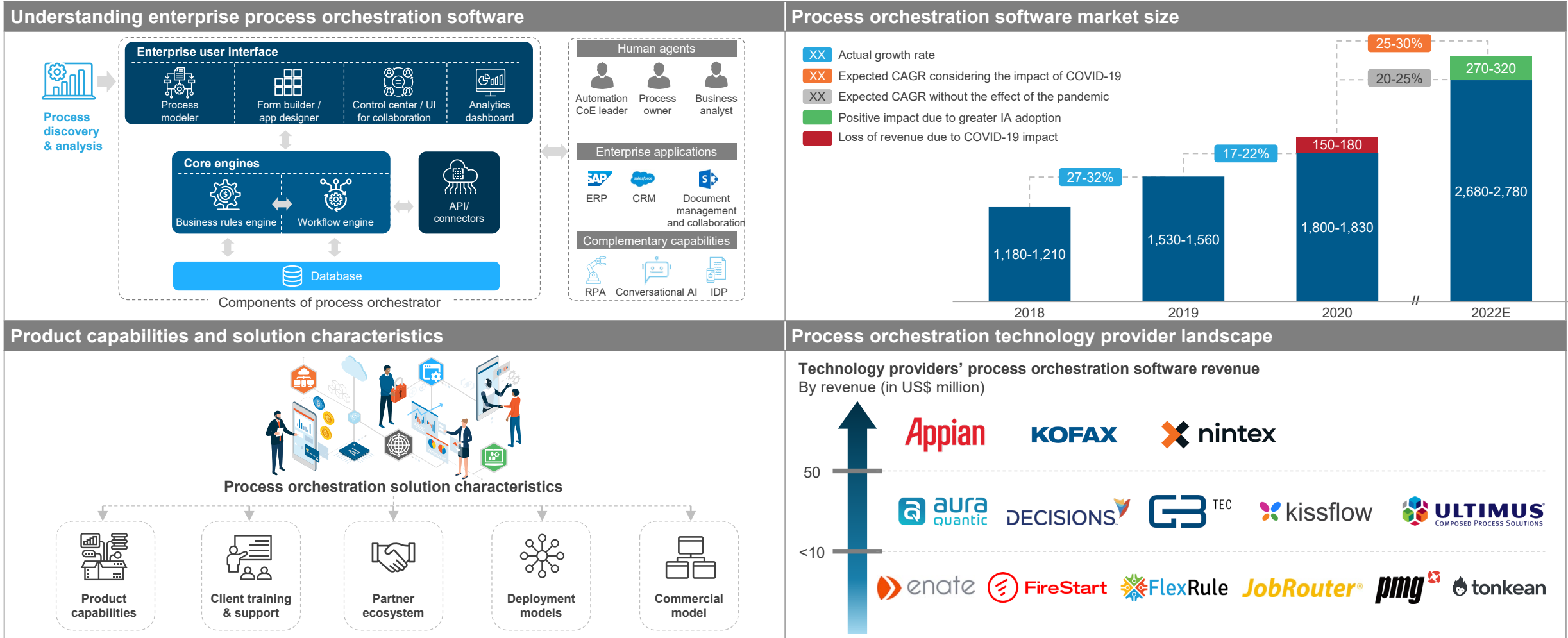
Process orchestration technology provider landscape

- The process orchestration landscape is fragmented with multiple types of providers catering to the need for managing processes better
- Process orchestration solutions are differentiated based on five parameters: process management capabilities, hybrid workforce management capabilities, implementation and support, market success, and portfolio mix
- Appian, Kofax, and Nintex occupy the majority share in the process orchestration software market
- Appian, Kofax, and Nintex are among the leading providers across all major industries and geographies

Outlook for 2021-22

- To deploy the transformation initiatives at scale, enterprises need to overcome siloed operations and better manage the interplay between various systems – resulting in an increased demand for process orchestration solutions
- Cloud-based deployments are gaining traction due to their scalable architecture, easier accessibility, reduced overhead investment, and lower cost and effort of infrastructure management
- Due to COVID-19, enterprises are looking for faster deployments, which has led process orchestration providers to accelerate the development of pre-built function-, vertical-, and technology-specific packaged solutions

This study offers six distinct chapters providing a deep dive into key aspects of process orchestration market; below are four charts to illustrate the depth of the report



This study also provides detailed view of 14 technology providers’ process orchestration offerings & capabilities as well as key strengths and limitations

Technology provider | process orchestration product profile (page 1 of 3)

Overview

Company overview

Technology offers a platform, which caters to various elements of digital transformation including identification and analysis of processes, automation and digitalization of work steps, and monitoring and optimization of business processes. The company has offices at five different locations across Continental Europe and Australia and a global partner network. Its customers range from medium-sized companies to global corporations across different industries.

Key leaders
 • XXX
 • XXX

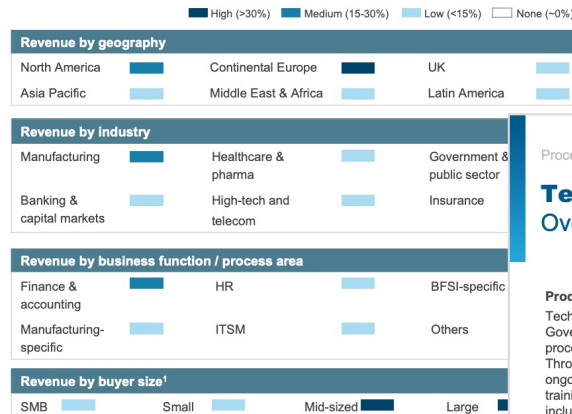
Headquarters: XXX
Website: XXX

Key clients include: Daiichi Sankyo, Dräger, E.ON, FANUC, Harmony Gold, Magna, MBDA, Porsche, Rolls-Royce Power Systems, Siemens, Vodafone, and Yazaki

Recent deals and announcements (not exhaustive)

- **November 2020:** partnered with bQuind to grow its presence in Belgium, the Netherlands, Luxembourg, and the UK
- **October 2020:** partnered with ERP provider proALPHA in the process mining and intelligence department to provide added value to both companies
- **May 2020:** acquired avedos, an Austrian software company that provides wide-ranging GRC solutions, to strengthen its offering in governance, risk, and compliance
- **February 2019:** launched a joint venture with Spanish business software provider Imatia to extend its business process orchestration offerings and serve the Spanish and LATAM region

1 Buyer size is defined as large (>US\$5 billion in revenue), mid-sized (US\$1-5 billion in revenue), small (US\$50 million-1 billion in revenue), and SMBs (<US\$50 million in revenue)



Technology provider | process orchestration product profile (page 2 of 3)

Overview

Product overview

Technology provider platform is made up of four modules: Process Design, Process Execution, Governance Risk & Compliance, and Process Mining. The platform facilitates process modelling, process analysis, and collaboration among users along with design and execution of workflows. Through its partnership with Apromore, it also offers capabilities to discover, visualize, and monitor ongoing processes within the platform. It also allows generation of process-based manuals for trainings, certifications, and audits. It supports multiple rule description languages and notation including OMG® standard DMN and Microsoft Excel.

Version number: 7.3.2

Release date: May 7, 2021

Strengths:

- The platform comes with an intuitive process modeler that allows users to tag flowchart objects and add comments to the process objects. It also offers pre-defined modeling templates reducing development time for business users and supports BPMN 2.0 for import and export of process diagrams
- The form editor provides a variety of field types (multi-line texts, checkboxes, file uploads, formula filed, etc.) and allows users to create multi-lingual forms. The created form templates are accessible to all users with appropriate authorization and can be reused for different use cases
- The platform allows to assign tasks to individual users and user groups, controlling the task assignment in real-time. It sends push notifications to notify the user about pending tasks. It also integrates with RPA tools and assigns tasks to robots based on availability

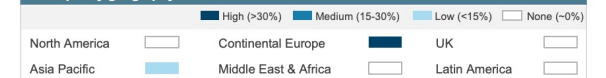
Limitations:

- The value proposition of the platform is not very strong for enterprises looking to have seamless integrations with wide variety of digital workforce, as it has limited partnerships with complementary technology providers such as conversational AI, IDP, process mining, and RPA
- It does not provide a community edition of the product, limiting its familiarity among SMB and small enterprises

Market adoption and capability overview

Description	2020	YoY growth
Process orchestration clients (individual logos)	338	74%
Process orchestration FTEs	47	124%
Number of service provider partners / resellers	25	27%
Number of technology/software partners	10	20%

FTE split by geography



Key service providers / reseller partners

AWS, Arvato Systems, Deutsche Telekom, and Sopra Steria

Key technology partners

Apromore, AWS, Imatia, Microsoft Azure, and UiPath

Research calendar

Service Optimization Technologies (SOT)

Published Planned Current release

Flagship SOT reports

Release date

An Evolving Digital Workforce to Assist Humans – Robotic Process Automation (RPA) State of the Market Report 2021	December 2020
Intelligent Process Automation (IPA) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2021	March 2021
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	April 2021
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	June 2021
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	August 2021
Robotic Process Automation (RPA) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2021	September 2021
Process Orchestration – State of the Market Report 2022	October 2021
Robotic Process Automation (RPA) State of the Market Report 2022	Q4 2021

Thematic SOT reports

Release date

The 360-degree Enterprise Automation Playbook	May 2020
Enterprise Process Orchestration	September 2020
Understanding Cloud-native RPA	January 2021
Mine Your Journey to Digital Excellence	March 2021
Intelligent Document Processing (IDP) Playbook 2021	June 2021
Process Mining Playbook 2021	June 2021
Scaling Up Intelligent Automation	August 2021

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